

marketingsherpa marketingexperiments

optimization summit 2012

MEASURE.
TEST.
CONVERT.

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Where to Test, What to Test, What to Ask:

How to get started in optimization

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How to Get Started in Optimization

- 1 Where to Test
- 2 What to Test
- 3 What to Ask

Where to Test

How to evaluate your data, and
your customers, to find the leaks

How to prioritize your testing sequence

Identify key pages in your funnel

1 IDENTIFY TOP PAGES ACCORDING TO TRAFFIC AND BUSINESS IMPACT

Amount

- Page views
- New visitors
- Returning visitors
- Revenue/Page

1. Identify key pages in your funnel

2 DETERMINE THE GOALS OF KEY PAGES

Res

- Purchase
- Clicks/Conversions
- Next Pages
- Next-Step Event Tracking

3 ANALYZE THE SOURCE OF VISITORS

- Search engines
- Search terms
- Previous pages
- Languages
- Organizations
- Top Landing Pages

4 UNDERSTAND THE VISITOR'S EXPERIENCE

Nature

- Entry/Exit pages
- On-page Event Tracking
- Browsers
- Platforms
- Time on page
- Transaction Details
- Page load errors
- Java Script versions

How to prioritize your testing sequence

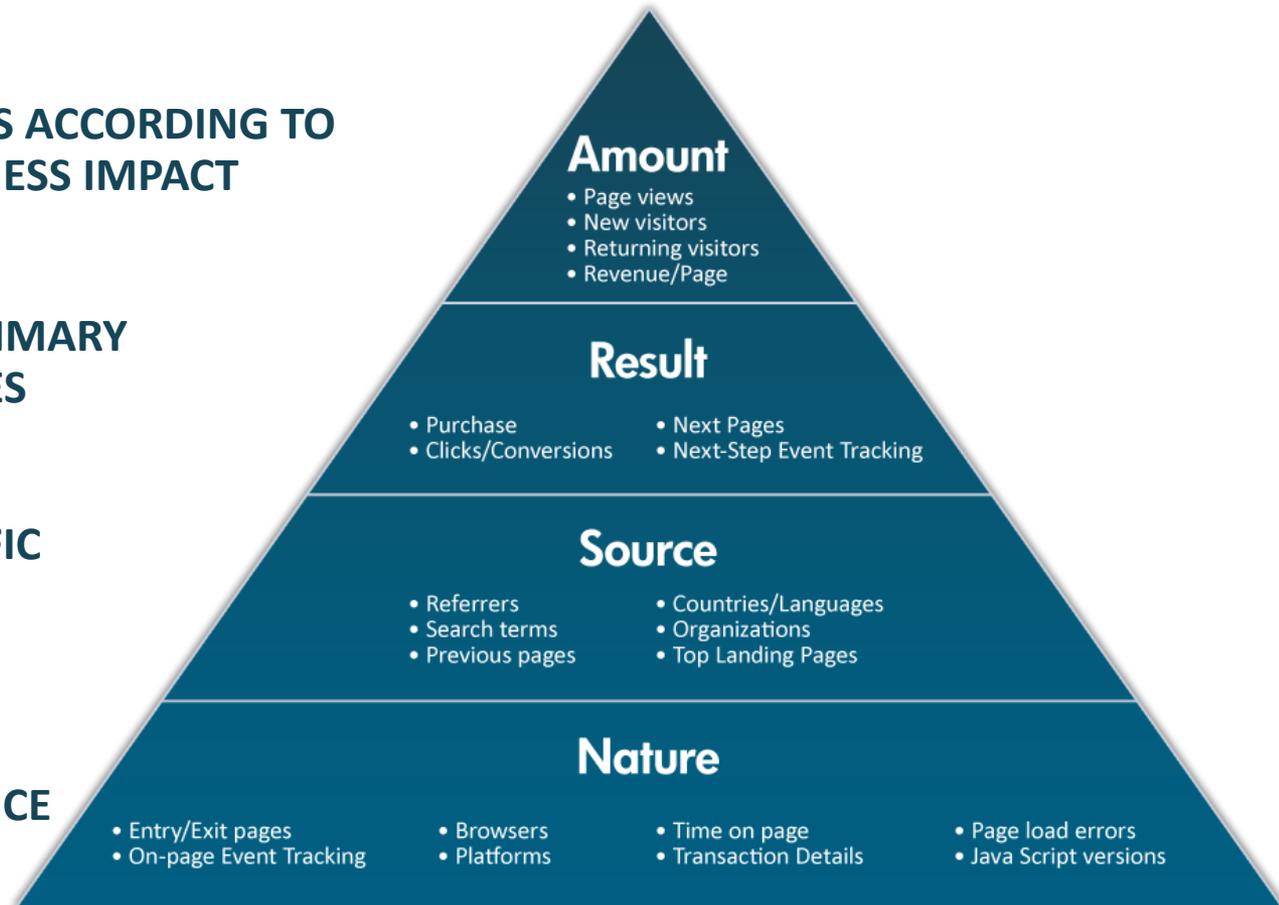
Identify key pages in your funnel

1 IDENTIFY TOP PAGES ACCORDING TO TRAFFIC AND BUSINESS IMPACT

2 DETERMINE THE PRIMARY GOALS OF KEY PAGES

3 ANALYZE THE TRAFFIC SOURCES

4 UNDERSTAND THE VISITOR'S EXPERIENCE



How to prioritize your testing sequence

Map primary conversion funnels

1 FUNNEL MESSAGING

2. Map primary conversion funnels

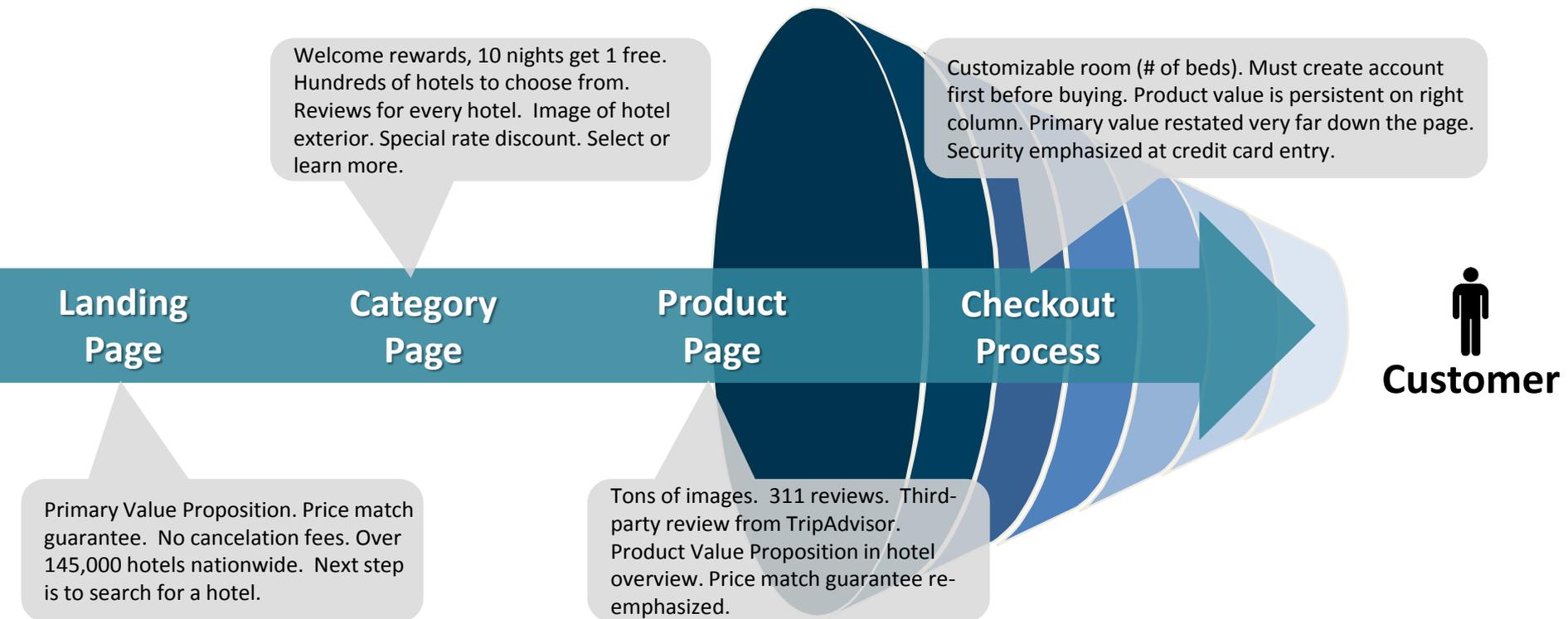
3-4 line summary of the messaging at this step in the funnel. Assess why someone would click or abandon.

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How to prioritize your testing sequence

Map primary conversion funnels

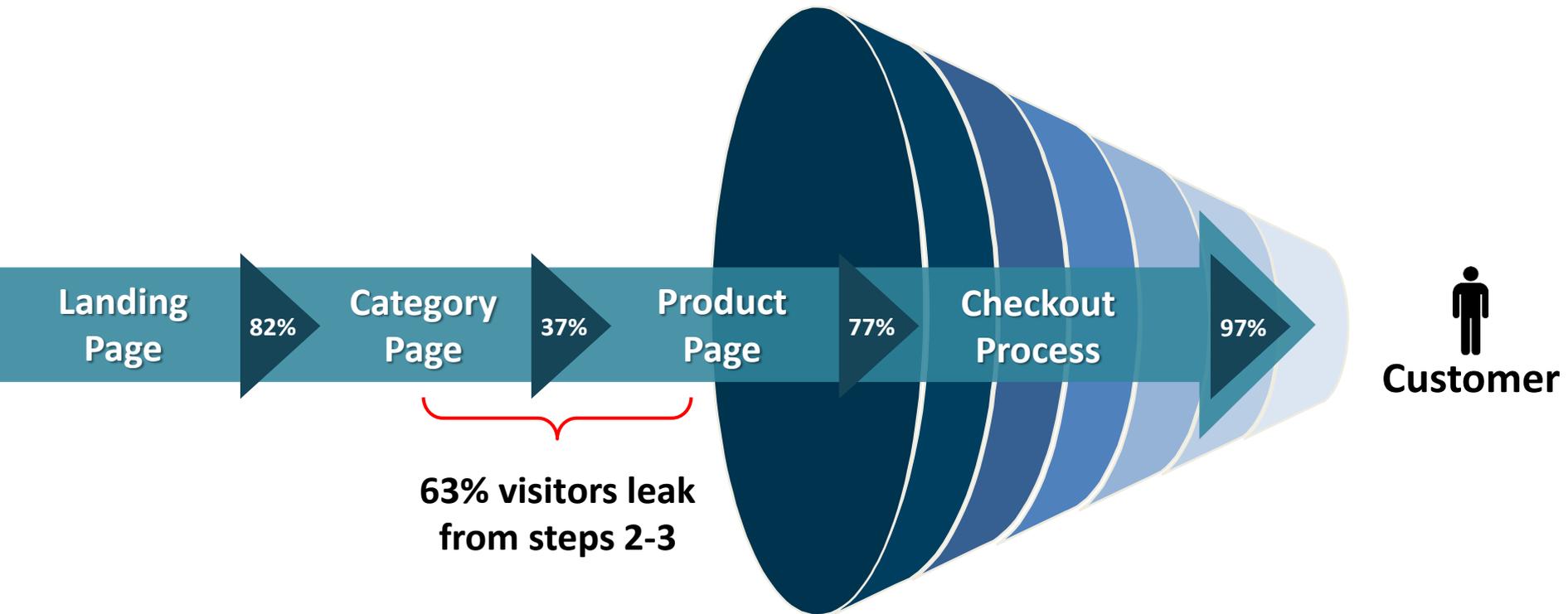
1 FUNNEL MESSAGING



How to prioritize your testing sequence

Map primary conversion funnels

2 FUNNEL PERFORMANCE



How to prioritize your testing sequence

Marketing Experiments Conversion Heuristic

3. Estimate conversion impact of each leak

Motivation

Incentive

Anxiety

Friction

Clarity of the Value Proposition

How to prioritize your testing sequence

Estimate the conversion impact of each leak

Marketing Experiments Conversion Heuristic

$$C = 4m + 3v + 2(i-f) - 2a^{\circ}$$

Motivation of the User

Incentive

Anxiety

Friction

Clarity of the Value Proposition

How to prioritize your testing sequence

Estimate the conversion impact of each leak

The **HIGHER COEFFICIENTS** of Motivation (4m) and Value (3v) indicate their impact on conversion to be greater than Friction (2f) and Anxiety (2a).



Degree of Conversion Impact

How to prioritize your testing sequence

Estimate the conversion impact of each leak

HOWEVER...both Friction and Anxiety are much easier to identify and fix. Motivation and Value typically involve more in-depth test preparation and more test iterations to achieve maximum impact.



Time to Impact Conversion

How to prioritize your testing sequence

Estimate IT impact of fixing each leak

System and
Process

- Do you use a CMS or need custom development?
- What are the proficiencies and limitations of testing platform?
- Is there a long process or quick turnaround?

4. Estimate IT impact fixing each leak

Type of
Page Being
Changed

- How long will it take to develop and submit for test?
- How complex are the changes being made?
- Layout may be more difficult than a headline change.
- Is this an extensive change to the page's functionality or code?
- Is this a stand-alone landing page or part of your main website?
- What is the goal of the page? For example, a click versus a credit card input.
- What systems is the page tied to or communicate with?

How to prioritize your testing sequence

Estimate IT impact of fixing each leak

How long will it take to develop and set up each test?

System and Process

- Do you use a CMS or need custom development?
- What are the proficiencies and limitations of testing platform?
- Is there a long process or quick turnaround?

Changes to the Page

- Assess the complexity of the changes being made.
- Layout may be more difficult than a headline change.
- Is there an extensive change to the page functionality or code?

Type of Page Being Changed

- Is this a standalone landing page or part of your main website?
- What is the goal of the page? For example, a click versus a credit card input.
- What systems is the page tied to, or communicate with?

Design of Experiments (example)

Once you've estimated the conversion and IT impacts of each potential test, prioritize them in a Design of Experiments or Test Plan document:

Testing Area	Objective	Variable	Est. IT Impact (1=Low, 3=High)	Est. Conv. Impact (1=Low, 3=High)	Traffic Source	Primary Metric	Secondary Metric (s)	Current Success Rate	Current Traffic Level (per day)
Product page	Improve click through rate on add to cart button	Page layout	3	2	Organic Search	Click through rate	Conversion rate, revenue	35%	1,500
Product page	Increase continuity from previous step	Headline	1	3	Organic Search	Click through rate	Conversion rate, revenue	35%	1,500
Homepage	More effectively communicate the company value proposition	Messaging	1	3	Organic Search	Click through rate	Conversion rate, revenue	52%	3,100
Homepage	Increase leads by adding a capture form	Form fields	2	2	Organic Search	Lead capture rate	Conversion rate, revenue, bounce	0%	3,100
PPC Landing Page	Increase number of submitted leads by increasing the perceived value	Product imagery	1	2	Paid Search	Lead capture rate	Conversion rate, revenue, bounce	15%	500
Shopping Cart	Increase clicks to the checkout page by mitigating anxiety with return guarantee	Right column content	1	3	All traffic	Click through rate	Conversion rate, revenue	25%	900
Checkout Page	Increase orders by making the process appear simpler with an accordion.	Page functionality	3	2	All traffic	Conversion rate	Revenue	56%	225

Sort the data inputs by IT and conversion impact

Find a balance that makes sense for your situation and objectives

What to Test

How to analyze your page to
determine what to test

Motivation of user

Marketing Experiments Conversion Heuristic

$$C = 4m + 3v + 2(i-f) - 2a^{\circ}$$

- **Where** are the visitors coming from?
- What do we know about them (**customer profile**)?
- What are their **needs**?
- How are they **engaging** with the page?
- Do the messaging and objectives **match their motivation**?

Clarity of the Value Proposition

Marketing Experiments Conversion Heuristic

$$C = 4m + 3v + 2(i-f) - 2a^{\circ}$$

- Within the **first several seconds**, what values are being communicated to the visitor?
- Is there enough **perceived value** to make the visitor say, “Yes, I will keep listening?”
- Are you **differentiating** yourself from the competition?
- Does every element on the page (e.g. images, supporting column, navigation, color scheme) **support the Value Proposition?**

Friction elements present

Marketing Experiments Conversion Heuristic

$$C = 4m + 3v + 2(i-f) \cdot 2a^{\circ}$$

- What on the page cause **difficulty, confusion, or annoyance** for the visitor?
- Is the page, process, or form fields **too long**?
- Is the **eye-path** disorganized, or is there a clear thought sequence guiding the visitor to the objective?
- Is there **too many things going on at once**, or is the page simple with clear objectives?

Additional incentive to take action

Marketing Experiments Conversion Heuristic

$$C = 4m + 3v + 2(i-f) - 2a^{\circ}$$

- An effective test plan will optimize for other elements first, then **seek additional improvement** (squeeze last few conversion points) with incentive.
- Is the incentive **relevant** to the visitor's motivations and page offering?
- What is the **return on investment** for the incentive?
- Does it have enough appear to overcome **negative forces of Friction** on the page?

Anxiety elements present

Marketing Experiments Conversion Heuristic

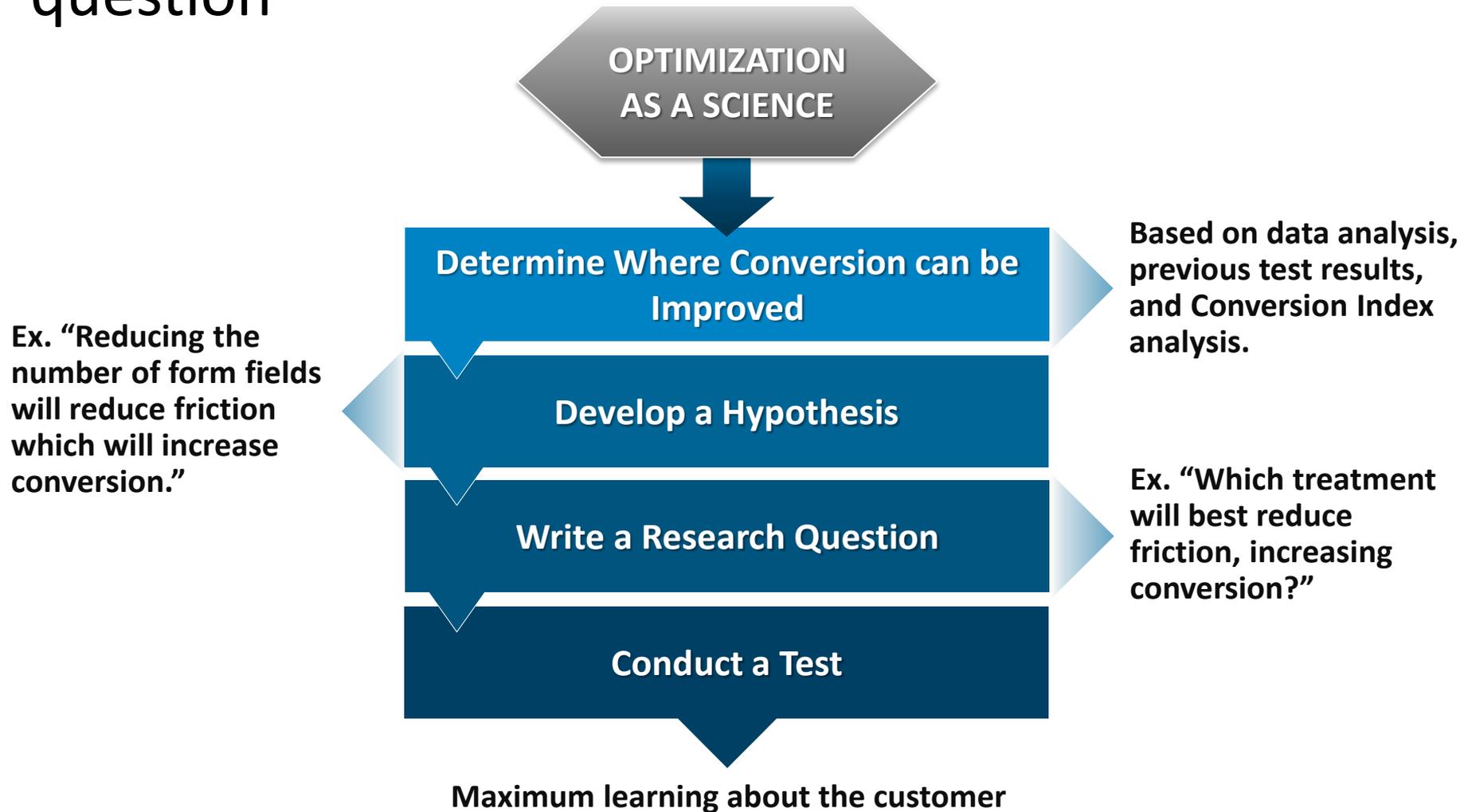
$$C = 4m + 3v + 2(i-f) - 2a^{\circ}$$

- What **fears or concerns** might the visitor be experiencing?
- Are your corrective measures (e.g. guarantee, secure seal, testimonial) placed in **close proximity** to the concern?
- Do your corrective measures **specifically address** the visitor's anxiety?
- How **irrational** is the visitor's fear or concern?

What to Ask

How to formulate a hypothesis and
research question

How to formulate a hypothesis and research question



The Hypothesis

1 HYPOTHESIS

Merriam-Webster defines “hypothesis” as:

An assumption made for the sake of argument.

- The **ASSUMPTION** is a statement you believe to be true about a website variable. For example, “Removing the phone number field will result in more lead submissions.”
- The **ARGUMENT** is the A/B test you set up in order to prove or disprove your assumption.

The research question

2 RESEARCH QUESTION

MarketingExperiments defines “research question” as:

A behavioral question expressed in a factorial split, so it must begin with “which.”

- **Not this..**
What is the best price for product X?
- **But this...**
Which of these three price points produces the most revenue for product X?

“

*... the aim of marketing is to make selling
superfluous.*

*The aim of marketing is to know and understand the
customer so well that the product or service fits him
and sells itself.*

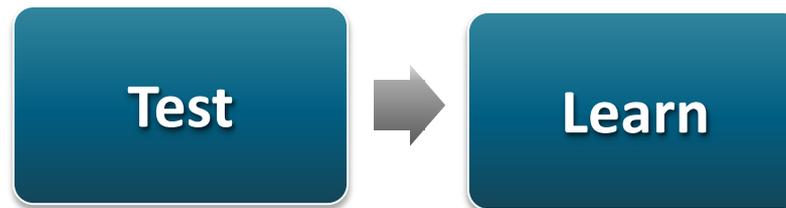
”

Peter Drucker
The Essential Drucker

The big picture

Testing process

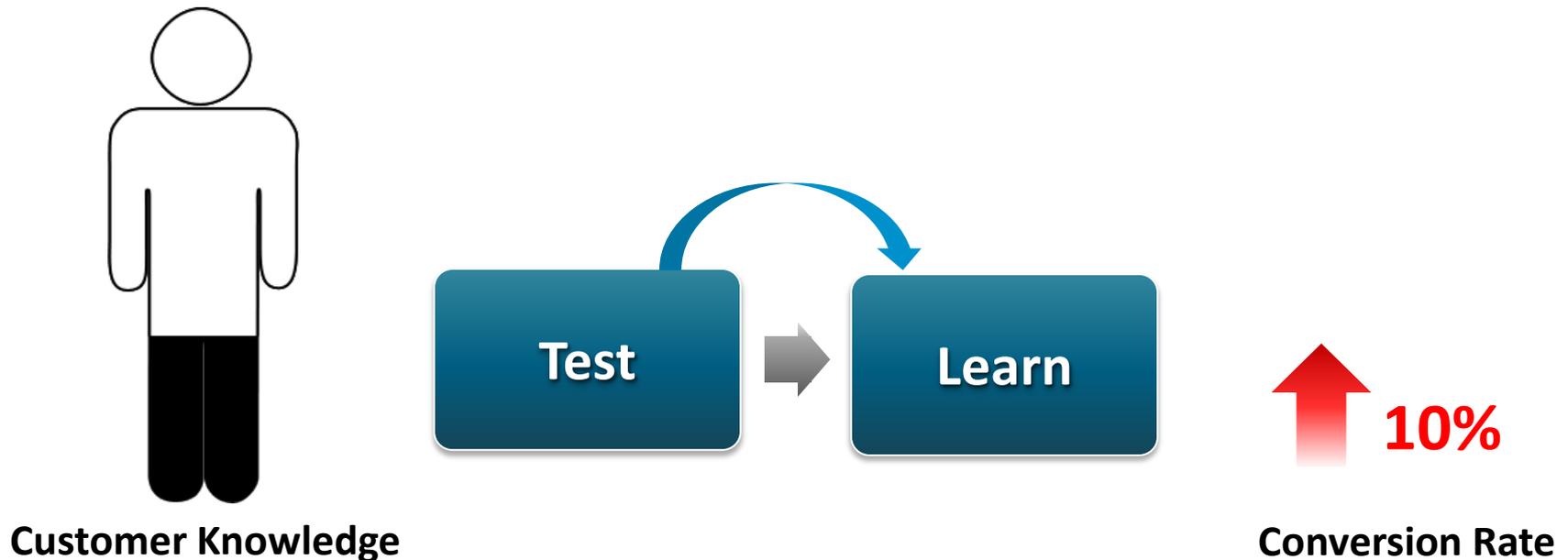
- Peter Drucker hits the nail on the head. The only way to truly optimize your website is to continually gain learnings about your customer through the **iterative testing process**.
- The only test that is a failure is one that did not yield a learning.



The big picture

Testing process

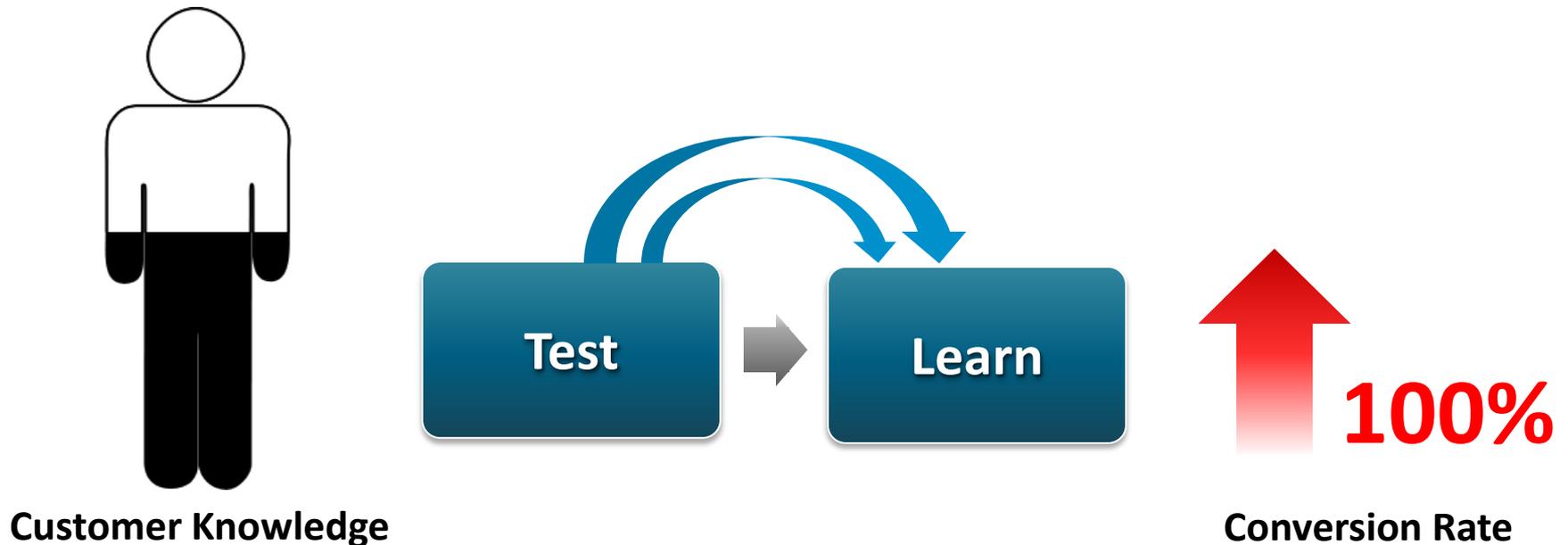
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Testing process

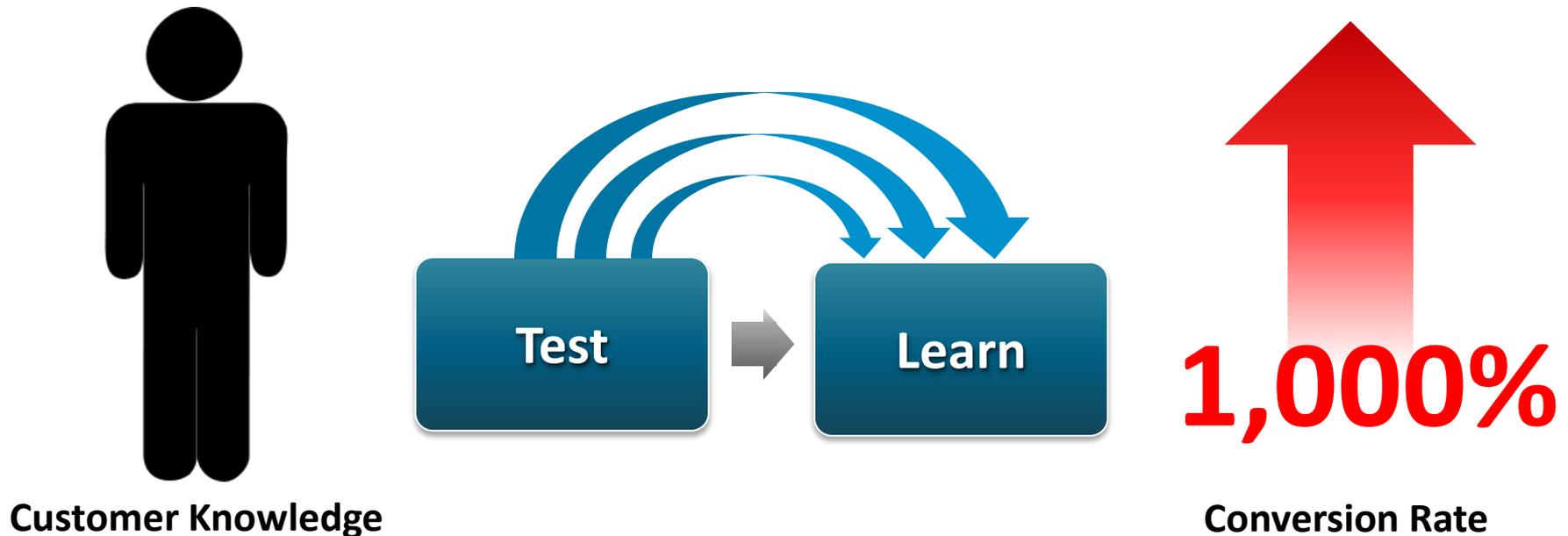
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The big picture

Testing process

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The big picture

Testing process

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